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United Kingdom

Fresh Deciduous Fruit

Annual

2005

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Report Highlights:
The UK remains a large consumer of apples and pears, but is increasingly reliant on imports for year round supply. Year-on-year imports of apples and pears increased by 6 percent and 13 percent respectively in MY2004. The U.S. is the fourth largest supplier of apples to the UK market, with red and organic fruit popular with traders and consumers alike. However, the UK market remains very competitive, with domestic production competing against EU crops and southern hemisphere fruit early in the marketing season.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
London [UK1]
[UK]

Table of Contents

Executive Summary

The UK top fruit sector has been in long-term decline. However, increases in plantings of new varieties and replacement plantings of key varieties contributed towards an increase in the area of dessert apples grown in the UK in MY2004. Domestic apple production in MY2004 totaled 204,674 MT, according to statistics from the Department for the Environment, Food and Rural Affairs (Defra). This signified a marked improvement on MY2003 yields, when total production was estimated at approximately 144,000 MT. Forecasts for the MY2005 dessert apple crop are upbeat, but any increases in production are likely to be offset by a fall in culinary apple output. For pears, domestic production is forecast to decline by circa 25 percent following cold weather earlier in the growing season.

UK imports of apples and pears continued on an upward trend in MY2004, totaling 516,905 MT and 148,585 MT respectively. France, South Africa and New Zealand are all key suppliers of apples to the UK. South Africa is also a key supplier of pears, alongside Belgium and the Netherlands. U.S. apple exports to the UK increased by 13 percent in MY2004 to 34,170 MT. The UK trade regards the U.S. as a key supplier of high quality fruit, particularly of red and organic apples. By contrast, U.S. pear exports to the UK are relatively small and decreased to 426 MT in MY2004.

The UK apple market remains very competitive. The extent of competition is particularly evident in the fall, when the marketing of the domestic and EU harvest coincides with continued availability of southern hemisphere fruit. As a result, U.S. apples typically arrive in significant volumes after this peak competition period.

In terms of sales by value, apples are currently the UK's most popular fruit. Euromonitor estimates per capita consumption at 14.1 kg per year. Overall, fruit consumption is on an upward trend in the UK. Driving factors include Government-led education programs, increasingly health-conscious consumers, continued innovation by retailers and wider availability of exotics and valued-added pack variants.

Recent changes to the European Commission's plant health regime have resulted several changes for many types of produce entering the UK, including import inspections and charges to cover the cost of inspections. As of September 1, 2005, U.S. apples qualify for reduced levels of inspection upon entry to EU member states, at a minimum rate of 15 percent.

The UK marketing year runs from July 1 through June 30.

Section I: Situation & Outlook

Production

Apples

The UK top fruit industry has been in long-term decline, with planted area and production levels falling dramatically over the last decade. However, the past couple of years could prove to represent a turning point in the sector. There has been an increase in new plantings, particularly of new varieties. At the same time, replacement plantings of Cox and Gala are considered a reflection of increasing confidence among top fruit growers.

Provisional data from the Department for the Environment, Food and Rural Affairs (Defra) indicates that planted area in the UK increased marginally in MY2004 to 9150 ha (see Table 1). Further data from Defra's most recent Orchard Fruit Survey indicates that the area of dessert apples is set to increase further. The 2004 survey indicates a 13 percent increase in dessert apple area among growers in England and Wales. This will impact on future production potential, particularly given that tree density in new orchards tends to be higher.

Table 1: Apple and Pear Area in United Kingdom MY2000 - MY2004 (Hectares)

Variety		MY 2000	MY 2001	MY 2002	MY 2003	MY 2004
Apples						
Dessert Apples -						
	Cox's Orange Pippin	4186	3489	3016	2738	3144
	Worcester Pearmain	283	207	196	147	213
	Discovery	484	420	339	264	301
	Early Season	248	258	201	175	276
	Mid Season Desserts	579	550	445	432	423
	Late Season Desserts	1882	1707	1433	1397	850
	Total Dessert Apples :	7662	6630	5628	5153	5207
Culinary Apples -						
	Bramley's Seedling	5118	4558	4045	3811	3763
	Total Other Culinary	234	241	241	180	180
	Total Culinary Apples :	5352	4798	4286	3991	3943
Pears -						
	Conference	1862	1903	1648	1365	1383
	Others	170	135	131	157	290
	Total Pears :	2355	2330	2041	1742	1673

Source: Department for Environment, Food and Rural Affairs (Defra)

Production forecasts for the current crop are upbeat, but remain subject to weather alteration following a shortage of rainfall earlier in the summer. The dessert apple crop is forecast to be above average. Specific variety forecasts include a Cox apple volume of circa 52,000 MT, Gala at 22,000 MT and a doubling of Braeburn volumes to 5,000 MT. For culinary apples, estimates of 50,000 MT for the English Bramley crop and 35,000 MT for the Northern Ireland crop were reported in mid July. If expectations are realized, this would represent a reduction of around 20 percent on the MY2004 culinary apple crop. However, the Fruit Growers' Association has been quick to indicate that there will be no shortage of Bramley volume, with a good balance between the fresh and processing markets anticipated.

Overall, reductions in the culinary apple crop should be largely offset by gains in dessert apple production. As a result, Post forecasts total apple production to decrease marginally from the 204,674 MT crop recorded in MY2004. Note that the PS&D tables (see Section II) contain revisions to apple production data. This follows alterations in Defra's publication of official fresh produce datasets.

Expectations are that MY2005 production will not yield the extent of oversize fruit that caused challenges for some growers in MY2004. English consumers show a preference for smaller apples, particularly when purchasing multipacks. Reports suggest that for some growers, up to two thirds of the Cox crop in MY2004 was above 80mm in size. Optimum fruit size, coupled with few occurrences of disease should mean that there is less concern over meeting supermarket specifications for the current crop.

Table 2: Home Production Marketed in United Kingdom CY2000 - CY2004 (MT)

	Variety	MY 2000	MY 2001	MY 2002	MY 2003	MY 2004
Apples						
Dessert Apples						
	Cox's Orange Pippin	48608	61024	41421	34521	46613
	Worcester Pearmain	3560	2561	2480	1959	2589
	Discovery	4587	3697	2942	2410	2197
	Early Season	1238	1291	1003	876	1708
	Mid Season Desserts	7797	6984	7084	6776	11883
	Late Season Desserts	35464	28875	29092	22430	31346
	Total Dessert Apples	101252	104431	84022	68972	96336
Culinary Apples						
	Bramley's Seedling	105121	105449	94013	73301	106740
	Other Culinary	2336	1906	1329	1599	1599
	Total Culinary Apples	107457	107355	95342	74900	108338
Pears						
	Conference	22921	35736	29636	26645	20823
	Others	975	510	681	1274	1884
	Total Pears	26577	38549	34194	29562	22707

Source: Department for Environment, Food and Rural Affairs (Defra)

Pears

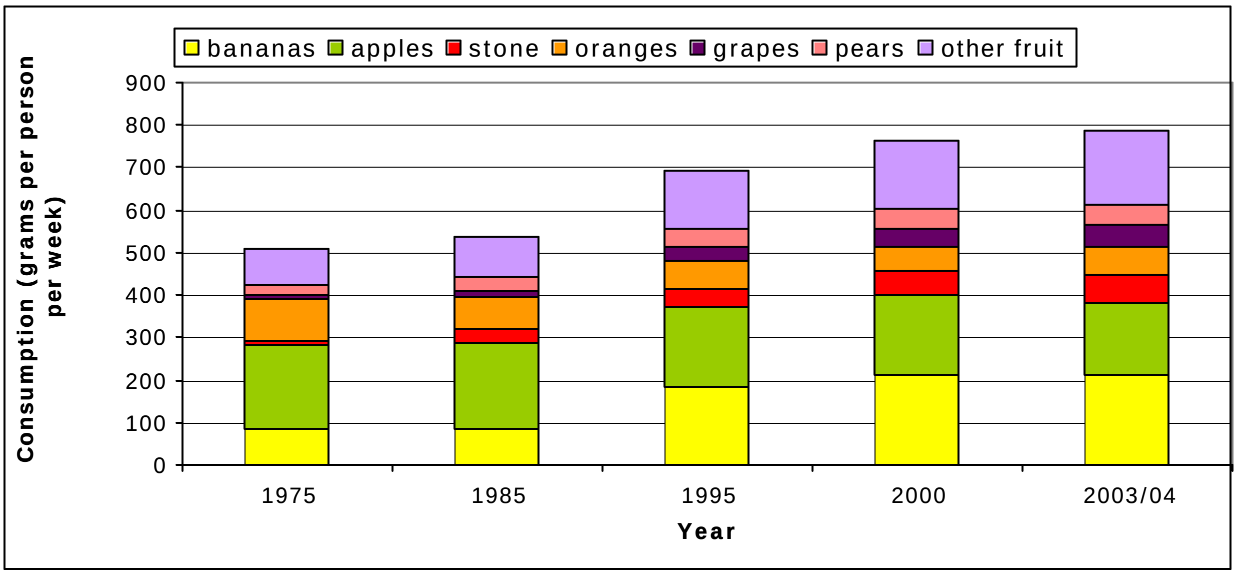
As with the apple industry, there has been a continued long-term decline in the area of pear orchards in the UK. The latest Orchard Fruit Survey indicates a year on year decline in area of 4 percent. In addition, cold weather in early May, at a crucial stage in flowering, looks set to limit production in MY2005. A large proportion of fruit fell from trees, leaving many remaining single fruitlets to bulk up. Therefore, the crop is expected to be down on MY2004 levels, when the UK crop was estimated at 22,700 MT.

Consumption

Apples

The latest UK National Statistics Expenditure and Food Survey revealed that fresh fruit purchases declined marginally in 2003/2004. However, the trend in consumption of fresh fruit over the longer term is clearly upwards as illustrated in Chart 1 below. Growth in fruit consumption has clearly been driven by the 'other fruit' category, which demonstrates the dramatic shift in availability and diversity of fresh produce that is available through UK retail outlets.

Chart 1: Household Consumption of Fresh Fruit 1975-2004



Source: National Statistics 2003/04 Expenditure & Food Survey

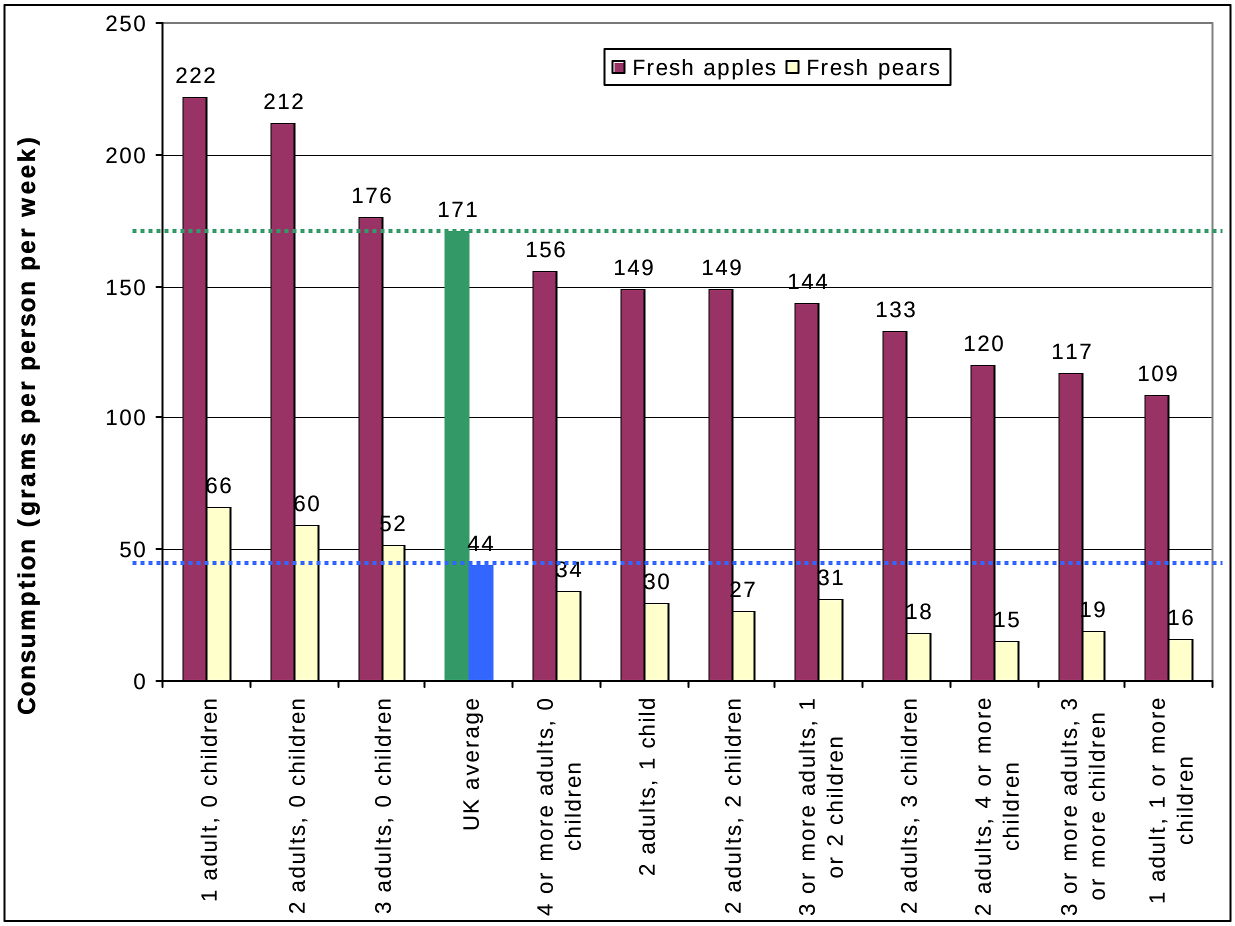
According to the Expenditure and Food Survey, UK apple consumption at home remains relatively stable. However, Euromonitor data for the UK fresh fruit sector indicates that annual apple consumption has increased by almost 12 percent over the last five years to 14.1 kg per capita. The difference in the two datasets may be explained by the fact that the Expenditure and Food Survey only includes food and drink brought into UK households. With increasing consumption of food outside of the home and healthy eating initiatives gaining credence in the foodservice sector, this increase in apple consumption is realistic.

In terms of volume consumed, apples are the UK's second favorite fruit behind bananas. However, in terms of sales value, apples are the leading fruit. UK apple sales in 2004 topped $1.15 bn according to Taylor Nelson Sofres data. Apple sales have benefited from supply chain improvements and heavy price discounting of bananas, in addition to some sales volume increases.

There are significant regional and demographic differences in fruit consumption, despite the UK being a relatively small country. For example, per capita consumption of fruit in Northern Ireland is 26 per cent lower than the UK average. By contrast, consumers in the South-West of England are the UK's leading fruit purchasers, buying almost 20 percent more fruit than the typical British consumer. Indeed, it is consumers in this region that are the leading consumers of both apples and pears, with statistics showing household purchases are 25 percent and 9 percent above the national average. As suggested by the low levels of consumption of fresh fruit, Northern Ireland consumers are again below the national average when it comes to consumption of both apples and pears. However, consumers in Scotland and northern England are also significantly below average consumers of top fruit.

A similar disparity in consumption levels is seen when looking at fruit consumption and household size. Households without children are all above average consumers of apples and pears, as indicated in Chart 2 below.

Chart 2: Consumption of Apples and Pears by Household Type



Source: National Statistics 2003/04 Expenditure & Food Survey

Like most food categories in the UK, supermarket chains dominate fresh produce sales. Collectively, they account for over 86 percent of apple sales and the share continues to increase at the expense of greengrocers and other independents. Although the UK is considered a mature market by many commentators, food retailing is characterized by its dynamism. The fresh produce sector benefits from such dynamism, where the leading supermarkets have been particularly proactive. New varieties, innovative pack types and the development of niche market opportunities are all typical activities that have been pursued by the UK's leading retailers. However, in-store sales promotions are increasingly centered on price discounts and multibuy offers.

Addressing obesity and encouraging healthy eating have become key issues for both the UK Government and the food industry. Government-supported initiatives include encouraging fruit and vegetable consumption through the "5-a-Day" program and provision of fruit to children via the National Fruit for Schools program. At the same time, retailers and food manufacturers have been proactive to ensure that they are supporting these initiatives. Top fruit is naturally well positioned to benefit from such healthy eating trends. However, advertising and promotion of fresh produce in the UK is still dwarfed by the expenditure on confectionery and snack foods. And with evidence to suggest that consumers are increasingly overloaded with healthy eating messages, these driving factors may not prove as influential as originally anticipated.

Bramley apples have always been promoted as the best variety for cooking, although a shrinking volume of fresh apples are used for meal preparation inside the home. Instead, the cash rich/time poor consumer is switching towards pre-prepared convenience foods, opting for chilled and frozen apple pies, pastries, tarts and other products. Processed Bramley apples represent an estimated 65 percent of total Bramley volumes, reflecting the growing demand from food manufacturers. Other varieties, including some low-grade apples for juicing, constitute the remainder of the processing sector.

Pears

The UK pear market is valued at approximately US$ 275m and pears account for 5 percent of fresh fruit sales at the retail level. Defra data indicates that average pear consumption is increasing over the long term. However, consumption of stone and soft fruit is rising at a much faster pace. As a result, pears could lose share in the fresh fruit category as consumers respond to the diversity and choice of fresh product on offer. Supermarkets again dominate retail sales and are giving the fruit greater focus. Imported pear varieties supply year-round demand and are increasingly positioned as premium products at the retail level.

Trade

Apples

The UK remains reliant on imports to meet domestic demand for apples. Total imports of apples increased by over 6 percent in MY2004 to 516,905 MT. The key suppliers to the UK are France, South Africa and New Zealand. Collectively, they typically supply approximately two thirds of the apple volume entering the UK.

U.S. apple exports to the UK have increased dramatically over the last two seasons, according to the latest trade data. MY2004 shipments totaled 34,170 MT. This represents a 13 percent year-on-year increase and is more than 50 percent greater than the volume recorded in MY2002. The U.S. has traditionally been the fourth largest supplier to the UK market and this resurgence in shipments has helped American fruit reclaim this position. However, U.S. producers were not the only beneficiaries of increasing apple imports into the UK in MY2004. Of the top ten suppliers to the UK market, seven recorded year-on-year increases, with only France, New Zealand and transshipments via the Netherlands witnessing a decrease in volumes.

Italy and Chile are both comparable to the U.S. in terms of the volume that they supply to the UK market. Italy is a key supplier of organic fruits while the Chilean fresh produce industry has actively targeted the European Union in recent years. Chilean producers are able to benefit through a nationwide good agricultural practices (GAP) regime for its fruit growers, known as ChileGAP. This is officially benchmarked against the European scheme, EurepGAP, and places them in a strong situation for supplying European markets and meeting the traceability demands of EU supermarket retailers. In addition, the EU/Chile Free Trade Agreement has increased the competitiveness of Chilean produce vis-à-vis third country suppliers.

In any current analysis of global trade trends, it is almost compulsory to consider the potential impact of China on the marketplace. At present, apple exports to the UK from China remain relatively small, totaling less than 7,000 MT in MY2004. However, UK trade and media are already viewing China as a dominant future force in the fresh fruit sector. Investments in private industry production and packing technologies will support exports and facilitate improved performance in terms of quality, food safety, product assortment and packaging. In addition, Chinese producers are working towards compliance with Eurepgap standards, which will further close any technical or quality gap. China's exporters and growers are already attracted by the high profit margins offered in UK markets for high quality produce. However, they are careful to ship only the best quality produce, recognizing that the expansion of future sales is particularly reliant upon establishing a positive image of the Chinese fresh produce industry among international customers.

Early indications of trade for the MY2005 season are that there will be strong competition for domestic and European crops due to carryover of stock from southern hemisphere. Early season prices have been driven down as a result. In addition, increased supplies from Poland and Hungary have had a knock-on effect on top fruit markets in continental Europe, and subsequently the UK. Trade reports suggest that French fruit stocks were running as high as 50 percent above last season's levels in early summer.

Pears

With relatively low levels of domestic production, the UK is reliant on imports for its pear supplies, typically importing circa 80 percent of domestic fresh consumption. The Netherlands, South Africa and Belgium are traditionally the key suppliers to the UK market. However, trade data may distort the true origin of produce. It is likely that Southern hemisphere fruit is shipped to the port of Rotterdam in the Netherlands, before onward distribution to the UK.

Pear imports in MY2004 totaled 148,585 MT. This represented a year on year increase of almost 13 percent and followed large crops in both the Netherlands and Belgium. By contrast, volumes of U.S. pears entering the UK fell by approximately 50 percent to 426 MT. This is the lowest level of U.S. pear shipments to the UK since MY2000. However, because the relative success of U.S. pears in the UK is particularly dependent on the availability of pears from European suppliers, this decrease was not unexpected.

Policy

Tariffs

In line with other EU countries, the UK import duty is established under the EU Harmonized Tariff Schedule. To calculate import duties for most fruit and vegetables, including apples and pears, the Entry Price System is used. The Tariff indicates a scale of entry prices per 100 Kg net. At the highest point on the scale, the Tariff indicates an ad valorem rate of duty only. As you proceed down the scale specific charges are introduced. Thus the lowest entry price generates the highest specific charge in addition to the ad valorem duty.

Non-Tariff Barriers

The UK, as a member of the European Union, conforms to the EU Quality Standards on all fresh produce for which standards have been applied. The standards provide a degree of consumer protection for a sector where most products are highly perishable and serious defects in the product can develop extremely rapidly. Also, they help build consumer and trade confidence in the quality of the produce they buy. The purpose of the standard is to define the quality requirements for fresh apples and pears after preparation and packaging. Each EU standard prescribes minimum marketing requirements for quality, size, tolerances, presentation and marking. There are three quality classes: Extra Class, Class I, and Class II. EU/UK Miscellaneous Additives legislation permits the use of Beeswax White, Beeswax Yellow and Shellac, as glazing agents/waxes on apples & pears. In addition to compliance with EU/UK Quality Standards and Food Additives legislation, all fresh deciduous fruit is subject to the EU/UK Pesticides (Maximum Residue Levels in Food) regulations. The full list of the fresh produce crops and the relevant EC legislation is available online at: http://www.defra.gov.uk/hort/hmi/common/standard.htm

In addition, all consignments of products subject to EC Marketing Standards imported into the UK from countries outside of the European Community are required to have a valid certificate of conformity or Certificate of Industrial Use prior to release into free circulation in the European Union (EU Regulation 1148/2001).

The regulations also oblige importers to provide all information necessary for the inspection authority to carry out their checks. The UK has established a system to enable importers to notify the inspection authority via the Internet. This system is called the Procedure for Electronic Application for Certificates from HMI (PEACH) and is now available for trader registration. Registrations can be made online (**http://peach.defra.gov.uk**).

Phytosanitary Certificates

Apples and pears are among the categories of plant produce and products that are permitted to enter the UK from non-EC countries, but must be accompanied by a phytosanitary ("plant health") certificate. This is essentially a statement that the plants or plant produce or products to which it relates have been officially inspected in the country of origin (or country of despatch), comply with statutory requirements for entry into the EC, are free from certain serious pests and diseases, and are substantially free from other harmful organisms. The regime is established by EC Plant Health Directive 2000/29/EC and specifies the requirements for phytosanitary certificates. Certain fruit, which require a certificate of conformity, also require a phytosanitary certificate.

There have been recent changes to the EC's plant health regime, including:

- the introduction of charges to cover costs of import inspections;
- a requirement to inspect all consignments of plants and all consignments of some types of plant produce imported from third countries, with scope for agreement to reduce the level of checking for low-risk consignments;
- a requirement that plant health checks be carried out prior to Customs clearance;
- a requirement for importers to provide advance notice to Plant Health Authorities of the imminent arrival of controlled materials

The UK's Department of Environment, Food & Rural Affairs (DEFRA) is in the process of implementing these changes. The charging regime was introduced on April 1, 2005 and more information is available online: http://www.defra.gov.uk/planth/newsitems/impnews1.htm

As of September 1, 2005, U.S. apples qualify for reduced levels of inspection upon entry to EU member states. The Directive requires that in order for a trade (a specific commodity from a specific exporting country) to be considered for a reduced level of inspection there has to be an average of 200 consignments per year imported into EU in each of last 3 years and at least 600 inspections carried out over the same period. It also requires a minimum of 200 inspections per year across the EU on trades subject to reduced checks.

In addition, Defra's Plant Health Guide for Importers provides a range of information concerning the entry of fruit, vegetable and plant materials into the UK. This publication is in the process of being updated to reflect the changes to the EC plant health regime and is available online: http://www.defra.gov.uk/planth/publicat/importer/impguide.pdf

Marketing

Following some criticism of retail marketing of domestic apples in recent seasons, the UK industry is in the process of establishing a steering group to shape the future of the sector. This group will address the challenge of increasing sales through all retailers by working to improve quality and consistency through the supply chain. Individual retailers have also set targets, with Tesco aiming to double sales of English apples over the next 3 years. The changes in the supply chain structure cannot be ignored and top retailers continue to reduce their supplier base. For example, Asda is channeling top fruit supply through just a sole supplier while Sainsbury's is rationalizing its supply case.

Domestic supplies are typically sold in the fall because UK dessert varieties are largely unsuited to storage and growers have limited storage capacity. With the bulk of domestic supplies entering the market in the fall, together with EU fruit and southern hemisphere produce still available, the UK market is very competitive early in the marketing year. As a result, the majority of U.S. apples are marketed from December onwards. The U.S. is regarded by the trade as a supplier of high quality produce and U.S. apples do command a premium, with UK consumers willing to pay a premium for the red and red bi-color apples. Also, organic fruits continue to attract a premium price in the UK.

The Washington Apple Commission and the U.S. Apple Export Council conduct marketing campaigns to coincide with the arrival of U.S. fruit. Market Access Program (MAP) and producer funding allow the U.S. top fruit industry to carry out these activities in the UK market. Consumer and trade activities include tastings, competitions, advertising, point-of-sale material and on-pack promotions. The continued support of these programs has been a key factor in the continued success of U.S. apple exports in an increasingly competitive UK market.

Promotional and marketing support is essential in the UK market, with all the main suppliers active at key times in the year. With the exception of Italy, the leading apple suppliers to the UK all conduct considerable promotional activity to support fruit sales at key times in the marketing year. Activities include radio advertising, sponsorship, tastings and school information packs. Just one recent example is a campaign by Cape brand apples campaign targeted at young professionals. This featured product giveaway/sampling to commuters across London and was supported by media coverage, with the aim of positioning Cape apples as a healthy workplace snack.

English Apples and Pears also conduct PR and advertising activity to support the domestic crop and the most active campaign is for Bramley apples. Bramley Apple Week and the 'Brammy' Awards feature heavily in the promotional calendar. This campaign is now in its twelfth year and these events generate high profile PR activity in consumer media, with the aim of encouraging consumers to either cook from scratch or purchase some of the pre-prepared products made with Bramley apples. Campaigns are increasingly targeted at the consumers of tomorrow, with current activities focusing on schools and catering colleges. The annual awards ceremony provides recognition to the trade for its role in promoting UK culinary apples.

Section II: Statistical Tables

Apples

PSD Table							
Country	United Kingdom						
Commodity	Apples, Fresh				(HA)(1000 TREES)(MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[N ew]	
Market Year Begin		07/2003		07/2004		07/2005	MM/YYYY
Area Planted	7610	9850	7250	9150	0	9750	(HA)
Area Harvested	7610	9850	7250	9150	0	9750	(HA)
Bearing Trees	7610	9850	7250	9150	0	9750	(1000 TREES)
Non-Bearing Trees	400	400	400	400	0	400	(1000 TREES)
Total Trees	8010	10250	7650	9550	0	10150	(1000 TREES)
Commercial Production	135500	143850	121200	204650	0	198500	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	135500	143850	121200	204650	0	198500	(MT)
TOTAL Imports	486100	485250	489800	516900	0	495000	(MT)
TOTAL SUPPLY	621600	629100	611000	721550	0	693500	(MT)
Domestic Fresh Consump	563080	560850	565000	628450	0	612550	(MT)
Exports, Fresh Only	20720	20750	13000	16800	0	19200	(MT)
For Processing	37800	47500	33000	76300	0	61750	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	621600	629100	611000	721550	0	693500	(MT)

Import Trade Matrix			
Country	United Kingdom		
Commodity	Apples, Fresh		
Time Period	MY	Units:	MT
Imports for:	2003		2004
U.S.	30361	U.S.	34170
Others		Others	
France	151465	France	150841
South Africa	91777	South Africa	105960
New Zealand	76132	New Zealand	64828
Chile	26088	Italy	31503
Italy	25714	Chile	29151
Netherlands	18424	Germany	27979
Germany	16182	Brazil	15758
Brazil	14385	Netherlands	15297
China	7053	Belgium	11923
Canada	4752	China	6860
Total for Others	431972		460100
Others not Listed	22921		22635
Grand Total	485254		516905

Export Trade Matrix			
Country	United Kingdom		
Commodity	Apples, Fresh		
Time Period	MY	Units:	MT
Exports for:	2003		2004
U.S.		U.S.	0
Others		Others	
Ireland	17464	Ireland	9999
Belgium	1778	Netherlands	3944
Netherlands	1066	Germany	1675
France	235	Belgium	961
Germany	140	France	201
Malaysia	19	Spain	10
Austria	18	Falkland Islands	8
Falkland Islands	8	Finland	2
Gibraltar	3	Gibraltar	2
Hong Kong	3	Portugal	1
Total for Others	20734		16803
Others not Listed	5		0
Grand Total	20739		16803

Pears

PSD Table							
Country	United Kingdom						
Commodity	Pears, Fresh				(HA)(1000 TREES)(MT)		
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	USDA Official [Old]	Post Estimate[New]	
Market Year Begin		07/2003		07/2004		07/2005	MM/YYYY
Area Planted	1740	1740	1700	1670	0	1650	(HA)
Area Harvested	1740	1740	1700	1670	0	1650	(HA)
Bearing Trees	1740	1740	1700	1670	0	1650	(1000 TREES)
Non-Bearing Trees	0	0	0	0	0	0	(1000 TREES)
Total Trees	1740	1740	1700	1670	0	1650	(1000 TREES)
Commercial Production	24040	29550	23900	22700	0	17250	(MT)
Non-Comm. Production	0	0	0	0	0	0	(MT)
TOTAL Production	24040	29550	23900	22700	0	17250	(MT)
TOTAL Imports	131980	132200	128000	148600	0	146400	(MT)
TOTAL SUPPLY	156020	161750	151900	171300	0	163650	(MT)
Domestic Fresh Consump	153200	158920	149050	168680	0	160950	(MT)
Exports, Fresh Only	2320	2330	2500	2020	0	2100	(MT)
For Processing	500	500	350	600	0	600	(MT)
Withdrawal From Market	0	0	0	0	0	0	(MT)
TOTAL UTILIZATION	156020	161750	151900	171300	0	163650	(MT)

Import Trade Matrix			
Country	United Kingdom		
Commodity	Pears, Fresh		
Time Period	MY	Units:	MT
Imports for:	2003		2004
U.S.	862	U.S.	426
Others		Others	
Netherlands	53388	Netherlands	54656
South Africa	25760	South Africa	27795
Belgium	15487	Belgium	18652
Italy	13082	Italy	16290
Portugal	7265	Portugal	13948
France	2948	France	3427
Spain	2937	Argentina	3023
Argentina	2465	Germany	2967
China	2345	Spain	2672
Germany	2160	China	2476
Total for Others	127837		145906
Others not Listed	3315		2253
Grand Total	132014		148585

Export Trade Matrix			
Country	United Kingdom		
Commodity	Pears, Fresh		
Time Period	MY	Units:	MT
Exports for:	2003		2004
U.S.	0	U.S.	0
Others		Others	
Ireland	1821	Ireland	1542
Netherlands	231	Netherlands	244
Belgium	177	Germany	133
Singapore	72	Belgium	74
Italy	21	Sweden	13
Sweden	2	Finland	11
Falkland Islands	1		
Afghanistan	1		
Germany	1		
Total for Others	2327		2017
Others not Listed	0		0
Grand Total	2327		2017